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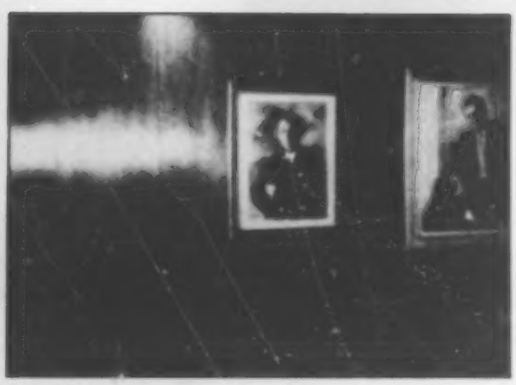
Advertising Age

Crain's International Newspaper of Marketing. In Two Sections. Section 1.

BATES PURGE



Off the wall

Missing portrait at Ted Bates Worldwide's headquarters is that of Robert Jacoby, who took the painting after a meeting with Saatchi execs from London. Remaining portraits are (from left) Ted Bates and Archibald McG. Foster.

Saatchi ousts Jacoby; Zuckert taking over

By STEWART ALTER and STEVEN W. COLFORD

Considering the web of power plays, intrigue and back-stabbing that led to Robert Jacoby being succeeded Sept. 19 as chairman-ceo of Ted Bates Worldwide by Donald Zuckert, last week's drama involving Saatchi & Saatchi Co.'s largest agency might be dubbed "Macbates."

And in the final scene, Mr. Jacoby, in an exclusive interview Sept. 19 with ADVERTISING AGE, told a different version of events from that given officially or reported widely by sources.

Mr. Jacoby who said he was hearing about the announcement officially for the first time from a reporter, acknowledged that he had been "forced out," and felt it might have been the Saatchis "taking revenge" because "they paid us so much money."

The changes were a stunning rejection of Mr. Jacoby's recent management realignment

(Continued on Page 126)

Gillette world buy aids Murdoch net

By VERNE GAY

NEW YORK—Gillette Co., working through Omnicom Group's BBDO agency, opens a new chapter in global marketing next month with the first transcontinental media buy.

Using Rupert Murdoch's News Corp. Ltd. tv systems, Gillette last week concluded a three-year, $4 million buy on Mr. Murdoch's proposed fourth U.S. tv network, the European direct-broadcast satellite Sky Channel, and Network Ten in Australia.

The single buy will reach 17 countries and, if successful, could expand to include Mr. Murdoch's international newspaper holdings in the U.K., U.S. and Australia.

The deal represents a major coup for BBDO and its holding company parent, Omnicom. Officially in business as of last month, this $5 billion agency group in large measure was designed so that Omnicom and its agencies would appeal to advertisers who are involved with global marketing.

Besides lending credibility to the Omnicom concept, the deal also lends considerable credibility to Mr. Murdoch's plan to use his worldwide broadcast and print media properties to facilitate U.S. advertiser expansion into global marketing. If the strategy works, it would give his News Corp. a considerable sales advantage over any of the Big 3 U.S. tv networks.

With FOX, Gillette becomes one of the new network's charter advertisers on "The Late Show with Joan Rivers" and at least two other programs scheduled to premier this fall. With Network Ten, Gillette becomes a primary sponsor of the network's coverage of the America's Cup yacht races in Perth next year.

Gillette's safety razor and personal care

(Continued on Page 128)

Last Minute News

Miller to test 'wheat beer'

MILWAUKEE—Miller Brewing soon will start test-marketing Dakota, a premium-price "wheat-brewed beer," in four to six markets, including Cincinnati and Lincoln, Neb. Tv spots were shot in Great Falls, Mont. Leo Burnett USA, Chicago, is believed to have the assignment.

Revlon eyes skincare line

NEW YORK—Revlon is developing a rejuvenating skin-treatment line with the Institut Paul Niehans, Heidelberg, to be introduced in 1987. No agency has been selected yet. The late Dr. Paul Niehans helped create the La Prairie brand for Jacqueline Cochran Inc. Revlon also reportedly is readying a new

(Continued on Page 8)

DENTSU'S GOHEI KOGURE ON ADVERTISING

No mergers

Other paths for growth

"The question is whether mergers are an advantage to the clients. It must be awfully difficult to solve these problems."

"Global marketing works, depending on the product. It should work for cameras or electric appliances. But it might be very difficult for package goods and food products."

Editor's note: The Japanese advertising industry is in its worst crisis since the mid-1960s. In a wide-ranging, exclusive interview, Gohei Kogure, president of Dentsu, Japan's largest agency, discusses where Dentsu is headed, megamergers, account conflicts and global marketing.

By JOHN WOLFE

TOKYO—Dentsu president Gohei Kogure's ideas about the global agency megamerger trend summarize the Japanese advertising industry's overall view of its counterparts elsewhere in the world.

"We keep our own pace here, and we're not affected by the mergers," Mr. Kogure said. "We have set our goals for the 21st Century and are moving toward those goals. We're not particularly affected by the recent moves in America and England."

On the surface, Mr. Kogure's

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NEWSPAPER

Tisch: Ad rates

Highlights

A chat with Gohei Kogure 1
The Japanese advertising industry is in its worst crisis since the mid-1960s. In a wide-ranging, exclusive interview, Gohei Kogure, president of Dentsu, Japan's largest agency, discusses where Dentsu is headed, megamergers, account conflicts and global marketing.

Gillette breaks global ground 1
Gillette Co., working through Omnicom Group's BBDO agency, opens a new chapter in global marketing next month with the first transcontinental media buy.

Pepsi sizzles with Slice 4
Pepsi-Cola USA has captured the No. 1 spot in the orange-flavor segment of the soft-drink market with Mandarin Orange Slice, though the product is only available in little more than half of the U.S.

Mayday for Plapler? 6
Texas Air chairman Frank Lorenzo's bid to create the largest airline in the free world by adding People Express and Frontier Airlines to his holdings means bumpy weather ahead for People Express agency Plapler Russo & Associates.

Big push for Diet Dr Pepper 12
Dr Pepper Co. will enter Diet Dr Pepper in the 1987 soft-drink wars with a 100% aspartame-sweetened, naturally flavored formula, with ad support for diet and regular Dr Pepper expected to climb past $35 million for the year.

Cullinet plans to expand 32
Cullinet Software has revealed new products and a revamped marketing strategy that the leading mainframe software company hopes will expand its reach. A $4 million ad campaign, themed "Access Cullinet," broke Sept. 15.

Wolfe's the man 40
With nearly $100 million in new business this year, DDB Needham Worldwide's Chicago office has emerged as a linchpin in parent Omnicom Group's struggle to maintain its business despite client losses due to conflicts. Perhaps no one has had more to do with the office's success than C.A. (Al) Wolfe, Chicago president and architect of its ambitious growth plans.

FEATURES

L. Flaherty

A promoter with flair 66
Lee Flaherty, chairman and 100% owner of Flair Communications Agency, is a man of immense personal charm and intense professional drive, a man who expects to be treated with respect. It is an expectation founded less on ego than on his knowledge of what he has done to earn it.

INTERNATIONAL

Agencies, S. Korea at odds 82
U.S. advertising agencies are facing potential new clashes with South Korea—Asia's second-largest ad market—over restrictions that keep U.S. shops out. Before next year, the international committee of the American Assn. of Advertising Agencies is expected to consider an issue that has become a "prime example of government restrictions keeping American agencies out," according to the committee's chairman.

OTHER NEWS

There's little doubt Quaker Oats Co. could transform Gerber Products Co. from a sleeper in the baby-food business to a marketing giant, but neither company seems ready to enter the merger playpen. Page 24.

Time Inc.'s latest magazine development project is starting its live test of the circulation and advertising markets. Page 36.

Saffer/USA, the newly spun-off arm of Toronto's Saffer Advertising, is poised to aggressively expand its U.S. presence with its reorganization of the $100 million parent agency. Page 49.

Chairman Lee Iacocca returns as pitchman as Chrysler Corp.'s 1987 model year advertising focuses on a barrage of new products to show that the company isn't "resting on our laurels." Page 50.

Wilkinson Sword USA may cut tv ad spending in favor of more print and sales promotion during the second year of a $23.5 million advertising and promotional program that began last fall. Page 64.

Fortunately for men's haircare marketers, the tide has turned back to grooming. In 1985, an additional 5% of the male population was adding hair-styling preparations to their daily ablutions, boosting market penetration to 25% and category sales to $135 million. *A Category Review.* Page 89.

SPECIAL REPORT

Barter syndicators, slugging it out in a soft market, are feeling the pinch from rollbacks on network tv pricing. Special Report examines some steps syndicators are taking to boost sales and which kinds of shows are successful.

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Tv prices tied to inflation, Tisch predicts

By CRAIG REISS

New York—Laurence Tisch, acting ceo of CBS Inc., last week declared that tv is no longer a commodities business.

At a press briefing at CBS headquarters Sept. 15, Mr. Tisch said advertiser spending on media now will reflect the consumer price index and the rate of inflation, a radical departure from traditional network tv thinking that tv is a commodity and that prices reflect supply and demand.

"I think we've come through a decade of above-average growth in advertising expenditures, and that decade is over," said Mr. Tisch, who also is chairman of Loews Corp. Loews owns 24.91% of CBS, and Mr. Tisch Sept. 10 spearheaded the ouster of former CBS chairman Thomas Wyman.

"We are in a new decade, where growth in advertising expenditures will be more in line with growth in the economy," he said. "Add to that total framework the competition we have for growth in media, and I think that total media expenditures will track the consumer price index."

Network sales executives long have argued that tv prices had nothing to do with the rate of inflation. This argument was especially voiced in recent years as the national inflation rate began to subside and advertisers increased their demands that annual network tv price increases no longer could reach double-digit levels.

Network and advertiser sources described Mr. Tisch's comments as realistic, but cautioned against presuming that network prices would see little or no increase in the next few years.

"The history of advertising spending [on tv] is that it has

(Continued on Page 128)

GM shakeup cuts shop fees

By RAYMOND SERAFIN

Detroit—General Motors is restructuring its relationships with its car agencies, cutting commission rates but at least partly making up for that by paying fees for collateral work the shops formerly performed for free.

One source indicated GM's eventual goal, through annual reviews of its agency arrangements, is to get the commission on media buying as low as 3%.

Neither the auto maker nor its agencies would comment officially on the changes. Philip Guarascio, executive director-advertising services, said only that GM is working with its agencies "to achieve superior advertising at a competitive cost with a fair return to them."

Sources indicated that each division is negotiating the specifics with its agency. In general, compensation for core work on each account is being set up on a sliding scale. Work on projects such as showroom catalogs will be done on a fee basis. Agencies conceivably could recoup their commission losses with those fees, depending on workload.

Shops affected are Campbell-Ewald, Warren, which han-

(Continued on Page 8)

West Coast News

Almaden Vineyards drops BBDO for Ciociola

San Jose—Almaden Vineyards ended its three-year relationship with BBDO, San Francisco, hiring New York-based Ciociola & Co. for its estimated $10 million account. The decision to hire Ciociola, made by new vp-marketing David Mantel, a former E. & J. Gallo marketing executive, follows an informal review involving BBDO and selected San Francisco and New York agencies. New ads introducing a new vintage red and white table wine line and a new Blanc de Blanc champagne will start in November and December. Earlier, Almaden announced it hired Ciociola for an undisclosed new-product assignment (AA, Sept. 15).

Hayward, Cal.—**Shasta Beverages** appointed Bloom Agency, Dallas, as its agency. Shasta, which has not advertised in more than six months, was purchased from Sara Lee Corp. early this year by National Beverage Corp., Fort Lauderdale, Fla. Shasta split with Needham Harper Worldwide, Chicago, last year (AA, Nov. 11). Shasta's last annual budget was near $8 million, but informed observers expect that figure to decline substantially under the new management.

Sacramento—The **California State Lottery** named Brenda Bonhomme, a former group product manager-grocery products, MJB Co., San Francisco, marketing manager-on-line games, a new post. Ms. Bonhomme will oversee "Lotto 649," a new game with an as-yet-unspecified start-up date. The Lottery still is searching for a marketing manager for

(Continued on Page 128)

Plapler hit by People Express sale

Is there a future under Texas Air?

By WILLIAM F. GLOEDE

NEW YORK—Texas Air chairman Frank Lorenzo's bid to create the largest airline in the free world by adding People Express and Frontier Airlines to his holdings means bumpy weather ahead for People Express agency Plapler Russo & Associates here.

Readying a challenge to industry leaders United Airlines and American Airlines, Texas Air has indicated the People Express and Frontier names will disappear: Frontier will be combined with Texas Air's Continental Airlines unit and People Express with Continental or some other Texas Air unit.

A key step for Mr. Lorenzo, the acquisition of Eastern Air Lines, was approved by the Transportation Department last week. Texas Air also controls New York Air.

People Express is a crucial account at Plapler, representing about $37 million of Plapler's $50 million in annualized billings.

"There is a threat here, logically," agency chairman Larry Plapler acknowledged last week. "But no one knows exactly what's going to happen yet." People Express' decision to ground Frontier Airlines and place it in bankruptcy already had ended Frontier's ties to Bloom Agency, Dallas.

Mr. Plapler said James O'Donnell, vp-marketing at Texas Air's Continental unit, has called to "say hello, just to tell me that they were aware of us and that he was sensitive to our position."

But Mr. Plapler said he had received no indications of how the proposed merger may affect his agency.

Mr. Plapler said his shop will continue operating even if People Express disappears, but "it would be three-quarters smaller."

The agency employs 40 people to serve four major accounts, including People Express.

Mr. O'Donnell said last week no changes would be made immediately if the sale is final. Analysts have speculated that the federal goverment may object to the proposed takeover because several People routes overlap those of New York Air.

"People Express has an agency, and I'm not aware that they have any plans to make a change," Mr. O'Donnell said.

"As long as People Express is People Express, they'll have their own ad agency."

He observed, however, that People will go out of existence "at some undefined point in time."

Mr. Plapler said his agency may pursue business from the much enlarged Texas Air once the various deals are closed.

He believes it will be "business as usual until People Express is folded into one of the Texas companies. And at that point, I see it as a tremendous opportunity. You can bet your teeth that we're going to be fighting to be a part of that deal."

But Texas Air's increasing size is attracting the attention of giant national agencies that also want to climb aboard the new airline colossus. The $25 million account at Houston-based Continental is in review and the race is between N W Ayer and J. Walter Thompson USA, both New York.

Miami-based Eastern is handled by Campbell-Ewald, Warren, Mich.; New York Air's agency is Levine, Huntley, Schmidt & Beaver.

If all the acquisitions are consummated, Texas Air would be flying about 590 jets. United, currently the biggest U.S. carrier, has 361 jets. The combined Texas Air empire also will have hubs in Denver and Newark, strong enough to be an issue when the Transportation Department reviews Mr. Lorenzo's takeover strategy.

In the New York area, People Express and Eastern rank first and second in flight departures. In Denver, Continental and Frontier both had strong operations.

Among Plapler Russo's other major accounts are Berkey Marketing Cos., the video and photographic equipment unit of Berkey Inc., Woodside, N.Y.; Media News Group, a newspaper group based in Texas whose owners recently purchased the *Dallas Times Herald* under a different corporate flag, and Hammond Maps and Atlases.#

> "It will be 'business as usual' until People Express is folded into one of the Texas companies. And at that point, I see it as a tremendous opportunity. You can bet your teeth that we're going to be fighting to be a part of that deal."
>
> ***—Larry Plapler, Plapler Russo & Associates***

CORRECTIONS & CLARIFICATIONS

• In the consumer linage report (AA, Aug. 18, P. 68), the 1986 current month total for the Weeklies/bi-weeklies category was reported incorrectly. The correct total is 8,170.3.#

"Total U.S. penetration of VCRs, at the time of the survey, was 34% — a level that indicates advertisers need to take VCR viewing seriously."
— **Advertising Age**, August 18, 1986

Finally. The facts on VCR users.

Do you know who's fueling the VCR boom? This October, National Demographics & Lifestyles is publishing its comprehensive study entitled **The VCR User Report.** It contains the first hard data on who's using VCRs, where they live, what they do, and where the market is growing fastest.

Based on NDL's 25-million-name consumer database, The Lifestyle Census,™ **The VCR User Report** provides detailed answers, market-by-market, segment-by-segment, on this complex and rapidly growing industry.

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THE LIFESTYLE CENSUS

NDL National Demographics & Lifestyles / 1621 Eighteenth Street, Denver, Colorado 80202 / Phone 303-292-5000
Denver • New York • London

Wine coolers double sales in '85

By JOHN C. MAXWELL JR.

Once again, wine coolers put in a spectacular performance, more than doubling in dollar sales from approximately $330 million in 1984 to about $750 million in 1985.

Over-all, we estimate that the cooler market had sales of 38 million cases in 1985 versus 14.8 million in 1984. This enabled the domestic wine industry as a whole to post a 7% increase in total gallons. However, due to a decline in imports for 1985, total industry's gallons were only up 4.4%. Without coolers, the over-all U.S. wine industry would have been down close to 6%.

However, the inevitable shakeout in the cooler industry began in 1985, and we expect it will continue this year. For the first year or so, entry into the cooler market was relatively easy, resulting in a peak of about 150 brands on the market in 1985. Then, as the "big boys" came into the picture with hefty ad budgets and savvy marketing skills, lesser brands began to drop out. As a result, in 1985 we estimate that the "Big Four" dominated about 75% of the market. These would include Brown-Forman's California Cooler with an estimated 30% share in 1985, E. & J. Gallo's Bartles & Jaymes with approximately 20%, Canandaigua's Sun Country with 15% and Seagram & Sons' Seagram Cooler with about 10%.

Gallo and Brown-Forman are vying for first place, and both have claimed to hold that position at different times. in 1985, we believe that the top 10 coolers held about 90% of the market. This supports our conclusion that further thinning of the ranks will occur within the 100 brands out there. In addition to the traditional categories that have been established, more of the majors now are trying to establish niches in what they call the wine "refresher" market. An example of this would be Anheuser-Busch with Bayberry's champagne cooler entry this year.

Although a slowdown in the 175% growth rate seen this year is expected, coolers will continue to grow at a good clip and could reach 70 million cases this year. This type of product fits perfectly with today's consumer preference for cool, sweet, portable beverages as well as a trend toward a more moderate and healthier life style. As wine coolers have an alcoholic content of 4% to 6%, they are generally lower in proof than either table wines or liquor.

Although coolers provided the leverage that the wine industry needed to move ahead, they have also affected table wine growth as well as beer. For example, in 1984 the table wine industry was off about 2%, but in 1985 fell about 5%. We estimate that approximately one-third of coolers sales have come from beer, with one-third coming from ordinary wine and the rest split between soft drinks and new users.

U.S. wine market: Sales and shares

Gallo continues to dominate the wine market, holding more than a quarter of the total share. Paul Masson and Wi Spectrum now owned by Seagram. (Combined 1983 volume would rank second). Figures are in millions of gallons ar share of market. *Source: John C. Maxwell Jr.*

Rank 1985	Rank 1984	Company	1983 Amount	1983 Share	1984 Amount	1984 Share	1985 Amount	1985 Share	Change 1984-85
1	1	E.&J. Gallo	144.0	27.3	142.0	25.6	152.5	26.3	7.4
2	2	Seagram Wines	49.9	9.5	49.9	9.0	57.0	9.9	14.2
3	4	Almaden	26.6	5.0	26.9	4.9	23.8	4.1	(1.5)
4	5	Heublein	39.5	7.5	21.5	3.9	20.8	3.6	(3.3)
5	3	Canandaigua	18.9	3.6	19.5	3.5	31.0	5.4	59.0
6	6	Franzia	10.8	2.0	14.3	2.6	16.2	2.8	13.3
7	7	Monarch	12.8	2.4	13.0	2.3	13.2	2.3	1.5
8	8	Guild	11.1	2.1	10.5	1.9	9.7	1.7	(7.6)
9	9	Sebastiani	6.5	1.2	6.0	1.1	6.6	1.1	10.0
10	13	Gibson	4.0	0.7	4.3	0.7	3.6	0.6	(16.3)
11	11	Mogen David	4.0	0.8	4.0	0.7	3.9	0.7	(2.5)
12	10	Robert Mondavi	3.5	0.7	3.9	0.7	4.1	0.7	5.1
13	11	Beringer	3.8	0.7	3.8	0.7	3.9	0.7	2.6
14	12	Lamont	3.5	0.7	3.6	0.6	3.7	0.6	2.8
15	14	Christian Bros.	3.3	0.6	3.3	0.6	3.2	0.5	(3.0)
16	19	F. Korbel	1.8	0.3	2.1	0.4	2.4	0.4	14.3
16	15	C. Mondavi	3.7	0.7	3.2	0.6	2.7	0.4	(15.6)
17	11	Bronco	3.3	0.6	2.9	0.5	3.9	0.7	34.5
18	17	Delicato	2.2	0.4	2.2	0.4	1.8	0.3	18.2
20	18	Guimarra	2.4	0.5	1.9	0.4	1.5	0.3	(21.1)
21	18	Weibel	1.9	0.4	1.7	0.3	1.5	0.3	(11.8)
22	19	Wente	1.5	0.3	1.4	0.3	1.4	0.2	—
23	20	Sonoma	1.0	0.2	1.0	0.2	0.9	0.2	(10.0)
23	29	Brookside	0.3	0.1	0.2	—	0.2	—	—
24	20	Sierra Wines	0.7	0.1	0.9	0.1	0.9	0.2	—
25	20	San Martin	0.7	0.1	0.7	0.1	0.9	0.2	—
26	21	Mirasou	0.7	0.1	0.6	0.1	0.7	0.1	—
26	27	Louis Martini	0.6	0.1	0.6	0.1	0.6	0.1	—
26	21	M&H	0.5	0.1	0.6	0.1	0.7	0.1	—
27	18	California Growers	0.4	0.1	0.4	0.1	1.5	0.3	—
28	23	East-Side	0.4	0.1	0.3	0.1	0.2	—	—
		Subtotal	364.5	69.0	347.2	62.6	375.0	64.8	8.0
		Other Domestic	32.6	6.2	64.8	11.7	66.0	11.4	1.9
		Total Domestic	397.1	75.2	412.0	74.3	441.0	76.2	7.0
		Imports	131.0	24.8	142.4	25.7	138.0	23.8	(7.4)
		Total	528.1	100.0	554.4	100.0	579.0	100.0	4.4

The import market fell to lowest point in three years wi 7.4% decline in 1985 and the decline since 1979. Four of the major importing countries, It Germany, Spain and Portu posted declines in 1985. The ex tion was France, which showe 2.3% increase. The largest dec was seen in Germany, which down 10.1%.

After losing a slight amoun market share in 1984, E. & J. G rebounded in 1985, widening No. 1 position in the domestic w market. Over-all sales were e mated to be up 7.4%, with the c pany capturing 26.3% of the t market. A good deal of this per mance was no doubt attributabl the company's entry into the w cooler market, with Bartle Jaymes.

Seagram's wine division showed a hefty increase (up 14. again aided by their cooler en Canandaigua posted the lar year-to-year increase and is ranked No. 3, up 59% in sale 1985 over 1984, again as a resul its Sun Country cooler.

In terms of company perf mances, this was pretty much story across the board; the o with strong brands in the w cooler category had the lar year-to-year growth. Of the to companies, Heublein, Almad Paul Masson and Guild were only ones to post declines. We pect this trend to continue, and companies that will be able to g their market share will be the o with good brand awareness in cooler market.#

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Another reason:
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Media Weight Tests
ARS
The ADVERTISING RESEARCH SYSTEM

Wilkinson may shave tv spending

By LISA E. PHILLIPS

Wilkinson Sword USA may cut television ad spending in favor of more print and sales promotion during the second year of a $23.5 million advertising and promotional program that began last fall.

Rising media costs and flat sales in the $678 million wet-shave category have caused Norcross, Ga.-based Wilkinson to reconsider its marketing strategy.

"We're constantly looking for more cost-effective means of reaching the market," said Wilkinson president Norman Proulx. "Tv still has its place, but now we're looking at radio and even billboards. We're seeing more and more radio and fsis being used by the competition."

Tv accounts for only 25% of this year's ad budget because of "prohibitive costs and underdelivery" of audience, Mr. Proulx said. He earlier hoped to spend more than one-quarter of the total dollars on tv but now is considering a smaller percentage. He said cable tv and the rising use of videocassette recorders have drawn viewers from network tv.

Mr. Proulx believes an approach targeted at specific segments employing sales promotional techniques will enable Wilkinson to compete more effectively than the earlier, broader shotgun approach via network tv.

Wilkinson has 1% of the wet-shave market vs. 60% held by Boston-based Gillette Co. Wilkinson also trails Bic Co. and Schick division of Warner-Lambert, which are battling for the No. 2 slot.

The company joins a growing number of advertisers (AA, July 28) in increasing sales-promotional activity at the expense of media. Its stepped-up sales-promotional activity included a product sample giveaway of its Retractor brand razors earlier this year to regional airline passengers, as well as a Fort Lauderdale "Spring Break" giveaway targeted to students vacationing in South Florida.

On Sept. 14, the company kicked off the second phase of its two-year campaign (AA, Sept. 9, '85), using 146 million freestanding inserts in newspapers to announce its Twin II disposable razor tie-in with S.C. Johnson Co.'s Edge shaving gel.

> "I'm dedicated to getting Wilkinson away from its dependency on disposables."
>
> —Norman Proulx, Wilkinson president

Mail-in coupons offer $5 cash refunds and $2 in coupons with the purchase of both products.

On Nov. 9, another fsi drop offers a 40¢-off coupon with the purchase of either the Profile or the W-II cartridge shaving systems. Technological superiority is stressed with ads headlined "Poly-tetrafluoroethylene XT-3. Only Wilkinson Sword can say it." Also, Wilkinson is sponsoring the "Pennant Chase" show, produced by Major League Baseball, on the Sportschannel cable network.

Wilkinson also will be supporting its higher-profit Profile and W-II cartridge razors with an estimated $3 million tv campaign beginning in January, and heavier sales promotions. Tv spots, via Burton-Campbell, Atlanta, are currently in production.

"I'm dedicated to getting Wilkinson away from its dependency on disposables," Mr. Proulx said. He predicts very slow growth over the next 10 years for disposable razors, currently 48% of total unit sales. Combined cartridges, blades and injector blade refills account for 52% of units sold, but 63% of total retail dollars.#

Fast-food chains' tv spending

Through the first half of 1986, network tv spending by the top fast-food and restaurant chains grew faster (up 15.7%) than did spending on spot tv (up 11.5%), reversing a trend to greater spot tv evident in 1985. Wendy's dropped to the No. 5 ranking from the No. 3 spot it held last year by decreasing network tv spending 5.9% and lowering spot tv spending 2.3%. Domino's Pizza, which increased total tv spending 77%, has moved to the No. 9 spot from No. 11 in 1985. ***Source: Television Bureau of Advertising, from Broadcast Advertisers Reports data.***

	First half 1985 ($ thousands)			First half 1986 ($ thousands)			Per cent change
Rank/Chain	Network	Local	Total	Network	Local	Total	'85-'86
1. McDonald's	88,386.7	54,883.2	143,269.9	102,267.1	57,708.1	159,975.2	+13%
2. Burger King	26,947.8	37,127.4	64,075.2	32,005.9	41,058.3	73,064.2	+12%
3. Kentucky Fried Chicken	20,431.8	13,776.2	34,208.0	23,913.2	14,743.2	38,656.4	+13%
4. Pizza Hut	10,052.0	20,562.3	30,614.3	12,869.1	24,630.7	37,499.8	+22%
5. Wendy's	18,656.4	19,001.1	37,657.5	17,599.6	18,557.9	36,157.5	– 4%
6. Taco Bell	--	19,475.0	19,475.0	--	24,249.1	24,249.1	+25%
7. Red Lobster	6,128.8	5,976.9	12,105.7	10,831.3	5,340.0	16,171.3	+34%
8. Long John Silver's	--	11,709.4	11,709.4	1,234.7	12,905.6	14,140.3	+21%
9. Domino's Pizza	4,296.0	3,248.6	7,544.6	7,023.6	6,365.3	13,389.9	+77%
10. Hardee's	3,398.7	9,073.2	12,471.9	----	12,469.2	12,469.2	--
11. Jack-in-the-Box	--	4,633.2	4,633.2	--	8,692.1	8,692.1	+88%
12. Dairy Queen	--	5,749.4	5,749.4	--	8,617.1	8,617.1	+50%
13. Sizzler	--	6,204.7	6,204.7	--	7,310.4	7,310.4	+18%
14. Denny's	2,108.3	7,985.8	10,094.1	4,523.1	2,322.0	6,845.1	–32%
15. Arby's	1,690.1	4,101.4	5,791.5	1,948.7	4,777.6	6,726.3	+16%
Top 15 total	182,096.6	223,507.8	405,604.4	214,216.3	249,746.6	463,962.9	+14%
Category total	185,182.9	312,306.7	497,489.6	214,279.2	348,332.0	562,611.2	+13%

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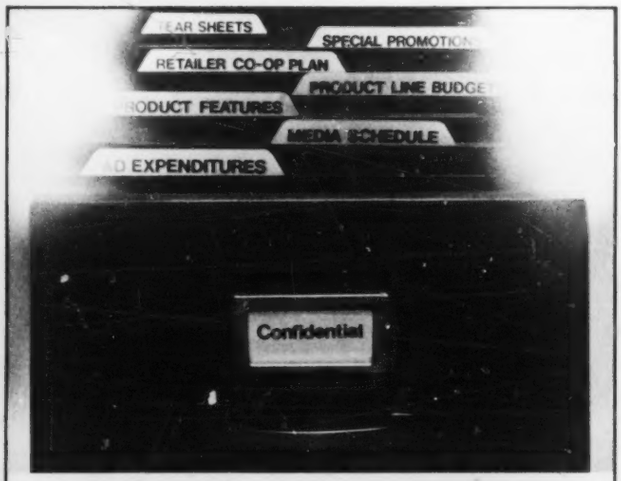

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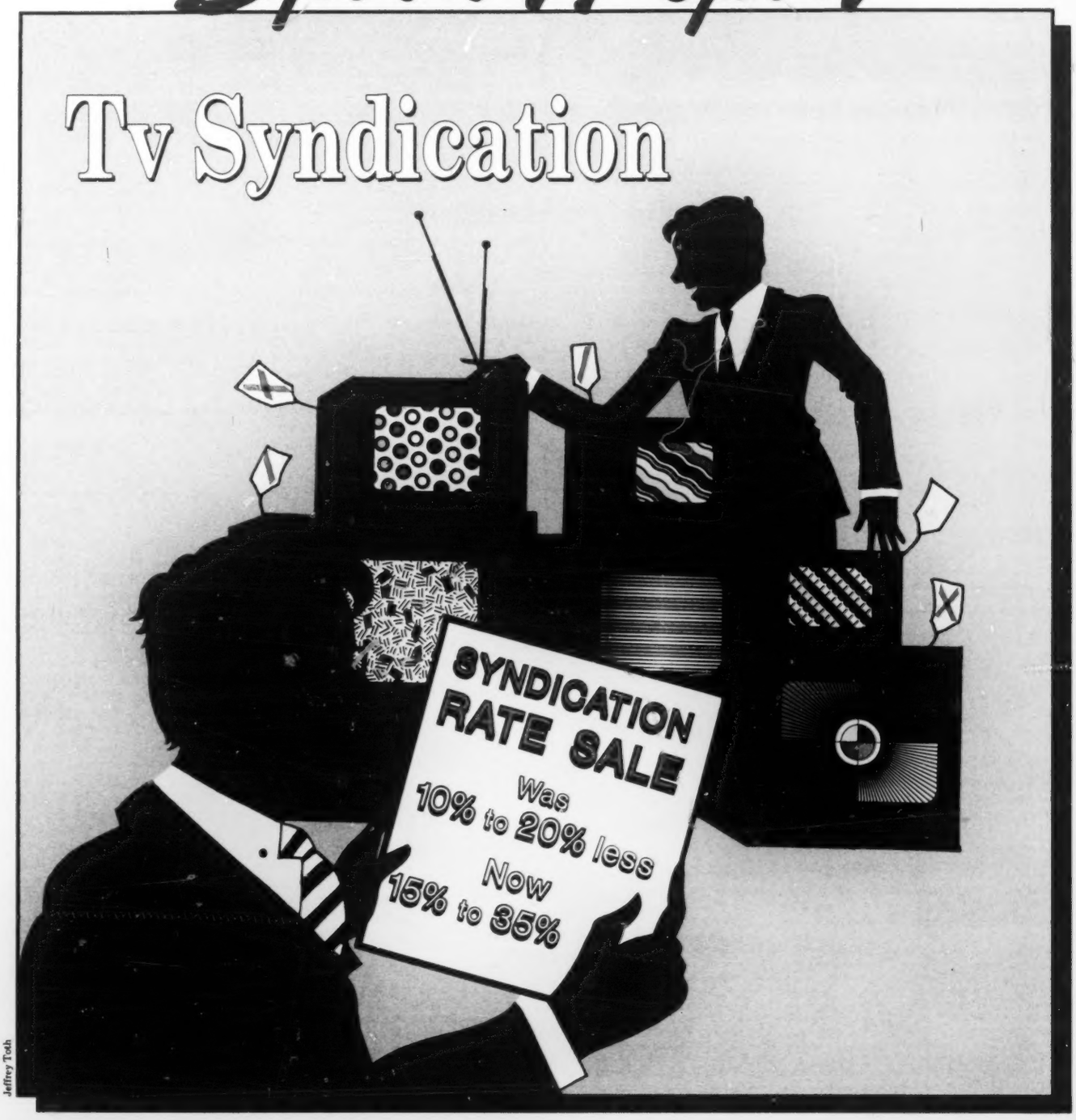
Special Report

Tv Syndication



Jeffrey Toth

Drop in network ad rates cramps barter's style

By Marcy Gray Rubin

It hasn't been as bad as a fire sale, but this year has been a few shades less than rosy for tv barter syndicators. Not only are they being asked to drop their prices or don't bother calling, but, with the rollback in network prime-time rates and all other dayparts as well, advertisers once dependent on syndicated programing as an alternative to costly network spots are no longer beating down the doors for availabilities.

Says one syndication sales executive: "The days of panicked phone calls from agencies claiming to be shut out [because of no network availabilities] are over."

Tv syndication's ad rates long have maintained a close link to networks, but never has this relationship been more vividly apparent. With network rate structures being reduced by 10% to 15% this year, syndication, which traditionally has sold its inventory for 10% to 20% less, is being forced to dip as much as 15% to 35% lower than network fare to attract buyers. To syndicators slugging it out in a soft marketplace, the impact of network rollbacks on barter sales is being felt in a measurable way.

Most syndication executives have no doubt that lower network pricing has directly influenced barter sales. Rich Goldman, vp and general sales manager, Buena Vista Television, a division of Walt Disney Co., Los Angeles, says, "Networks will always be in the driver's seat because of their coverage and national distribution. Because networks and syndicators compete for the same buyers, if networks lower their rates when the market isn't brisk, they take away syndication's pricing advantage."

Another assessment of the situation is that the price slump reflects an over-all cautiousness on the part of advertisers, who are exerting

(Continued on Page S-2)

Marcy Gray Rubin is a New York-based freelance writer.

Top rated syndicated shows

	Avg. audience rating within area of coverage
1. Wheel of Fortune	16.1
2. Jeopardy	9.9
3. The Big Spin	8.3
4. M*A*S*H	8.0
5. Eyes of Texas	7.8
6. The New Newlywed Game	7.3
People's Court	7.3
8. Entertainment Tonight	7.2
9. PM Magazine	7.0
Three's Company	7.0

Source: Nielsen Station Index Cassandra Rating, July, 1986

Network rates cramp barter

(Continued from Page S-1)
equal pressure on the networks and syndicators.

Individual dayparts are responding differently to the rollback, according to Dan Cosgrove, New York-based vp-media, Group W Productions, and president of the Advertiser Syndicated Television Assn., the trade organization representing 23 syndication companies. Mr. Cosgrove notes that prime-time activity has been strong, and animated weekday after-school children's strips, led by Tribune Co.'s "GI Joe," Group W's "He-Man and She-Ra" and Lorimar-Telepicture's "Thundercats," are performing exceptionally well.

> ***"Advertisers are seeking stability in syndication companies. They're looking for clearances in top markets with solid station lineups."***
>
> **Rick Levy**
> **Camelot Entertainment Sales**

Daytime remains the weakest link in barter syndication sales. Eroding female audiences have caused advertisers to siphon off daytime dollars and shift them to prime time, where there is greater female viewership.

"We're not able to get near the cpms [cost per thousand] we thought we could in this daypart," says Clark Morehouse, New York-based vp-media sales, Tribune Entertainment.

Mr. Cosgrove suggests that as insufficient ad support forces syndicators to stop producing first-run daytime programing, this time slot will revert to the networks.

Perhaps syndication's biggest battle is not being waged against the networks but against itself. Once considered broadcasting's black sheep, the industry's recent success and increased respectability has attracted scores of new players. But there remains a vast difference between the Goliaths, such as Lexington Broadcast System Communications and King World, with their substantial inventory of sure-fire hits, and the Davids, the newcomers with a few borderline shows.

"Because of the inherent risks in syndication not generally found in network," says Rick Levy, president of Camelot Entertainment Sales, a division of King World, New York, "advertisers are seeking stability in syndication companies. They're looking for clearances in top markets with solid station lineups."

Adds Larry Feinstein, vp-national advertiser sales, All American Television, New York, "Only a handful of shows are secure. There is a real disparity between the top-rated shows and everyone else."

The hotly demanded shows may not be quite as vulnerable to soft network pricing. Steve Goldman, vp-sales marketing, Paramount Pictures, New York, whose "Entertainment Tonight" covers 92% of U.S. tv households, says, "Buyers look on any barter show that provides 90% coverage as equal to any network show. Audience demographics and coverage is the key. It doesn't matter if they're syndication or network, advertisers want properties that perform."

Joseph F. Cifarelli, New York-based vp-media sales, Multimedia Entertainment, agrees. "Strong syndicated programs will always sell out," he says. Multimedia hopes the same success that its "Donahue" has enjoyed will rub off on "Sally Jessy Raphael," which has sold 80% of its inventory upfront.

No two shows are more indicative of syndication's success in a soft market than top-ranked "Wheel of Fortune" and "Jeopardy." Dubbed the "phenomena of the industry," these King World productions have achieved the near impossible —a rate increase.

With advertising sales of 87% at press time and a 10% yearly increase in ratings and audience over the past two years, "Wheel," with a 16.1 rating in Nielsen's July, 1986, Cassandra report, holds a record asking price of $95,000 per 30-second spot, based on a projected Nielsen National Television Index yearly rating of 19.0 for the upcoming season. "Jeopardy," called the "Cosby of syndication" by Camelot's Mr. Levy, has a Cassandra rating of 9.9 and, with a projected yearly NTI rating of 13, is asking $53,000 per 30-second spot (AA, Aug. 18).

Despite their dazzling track records, even these blockbusters remain victims of the marketplace to some degree. "If networks were able to raise their cpms by 10%, we would have done the same," Mr. Levy says.

King World is counting on repeating its success with newcomers "The Oprah Winfrey Show" and "Nightlife" with David Brenner. Already, "Winfrey" covers 90% of the country on 100 network affiliates, and "Nightlife" is seen in more than 100 markets. In Mr. Levy's opinion, late-night rates are equal to or slightly higher than last year's because of the eroding daytime female audience and advertisers' subsequent decisions to place more dollars in night-time programing.

In any season the chance of survival for many new shows seems slim. More than one syndicator confesses to having trouble getting new syndicated programs, even proven offnetwork hits, off the ground. Lacking the clout of ratings or recognition, new shows often fail to attract advertisers. "Buyers will always use leverage when dealing with these shows whether they are syndicated or network," Paramount's Mr. Goldman says.

However, not all newcomers are feeling the pinch. Although this marks Disney's first year in barter sales, the company is successfully moving its limited inventory. In addition to returning its "World of Disney" and feature film package "Disney Magic I," Disney unveils three new entries this season: "Siskel & Ebert & the Movies," "Business Day" (working title) and the animated "Duck Tails."

"Despite the knowledge that cpms are a driving factor, I'm not reacting to network pricing when I'm selling," says New York-based Rick North, vp-advertiser sales, Buena Vista Television. "It's the buyers who bring it up. My response is to make a deal that is comfortable for everyone."

The fallout from cheaper network rates also has forced syndicators to push for upfront sales, rather than gamble on the scatter market. This strategy has been adopted especially by bigger syndicators that have the most inventory to sell. According to Mike Wieden, New York-based exec vp-advertising sales, LBS Communications, returning shows such as "Fame," "What's Happening Now" and "MGM/UA Premiere Network," are virtually 90% sold at press time, while new entries such as "Hollywood Squares" and "The New Gidget" are 80% sold. "We don't leave anything significant for scatter if we can get fair prices upfront," Mr. Weiden says.

Tribune Entertainment's Mr. Morehouse cites similar figures, stating that 85% to 98% of his company's inventory has been purchased. This includes offnetwork property "Charles in Charge" and first-runs "At the Movies" and "What a Country." He says the difference between scatter and upfront rates isn't lucrative enough to warrant holding off sales.

At the other end of the spectrum, smaller barter companies such as Buena Vista may choose to allocate larger chunks for scatter budgets in the hope that the market will firm up.

Despite evidence that upfront sales are moving smoothly, Mr. Feinstein accuses some syndicators of "psychologically booking orders that haven't been confirmed by the agencies." He sees no concern on the part of advertisers that delaying their decisions will cost them availabilities. Group W's Mr. Cosgrove, however, says, "Sales have recently tightened up as advertisers have decided to come off the fence."

As networks and syndicators vie for the same shrinking dollars, the stage may be set for a classic shakeout. According to Mr. North and others, those companies most financially vulnerable are what he terms "the one or two-note syndicators." Lacking other profit centers, they bank on the ratings of a few shows.

Says Buena Vista's Mr. Goldman, "Most new products have a tendency to fail. Those who will withstand the shakeout will need deep pockets to survive." To guarantee their solvency, Mr. Goldman predicts an increase in mergers among smaller syndicators, while larger companies will broaden their distribution channels through station ownership.

All American Television, in an effort to diversify, is involved in a joint distribution venture with Group W, Mr. Feinstein says. These programs are "Newsfeed," a Group W production, and "Entertainment Report," a 15-minute satellite feed produced by All American that can be inserted in local, early evening news. He says All American, which currently syndicates "America's Top 10," intends to enter cash sales, although barter still will comprise 70% of its business.

A brighter scenario offered by Camelot's Mr. Levy calls for narrowing the gap between network and syndication rate structures. "Today a 15 rating in network and a 15 in syndication won't command the same advertising dollar, but as syndicated shows continue earning ratings equal to the networks, these differences will shrink and pricing will level out."

The most immediate concern among syndicators, however, is how long the current price dip will last. Paramount's Mr. Goldman and LBS' Mr. Weiden say pricing slumps evolve naturally and can just as easily bounce back with the arrival of the election year and the Olympics in 1988. Mr. Goldman also is confident that the absorption of commercial availabilities resulting from 15-second spots will tighten up the market.

Both Tribune's Mr. Morehouse and Multimedia's Mr. Cifarelli predict an upward trend, possibly as soon as next year. According to Mr. Cifarelli, the change will affect prime time before it trickles down to daytime. Not as optimistic as his colleagues, Mr. Feinstein sees no need to panic, but doubts ad budgets are likely to reach their former rates.

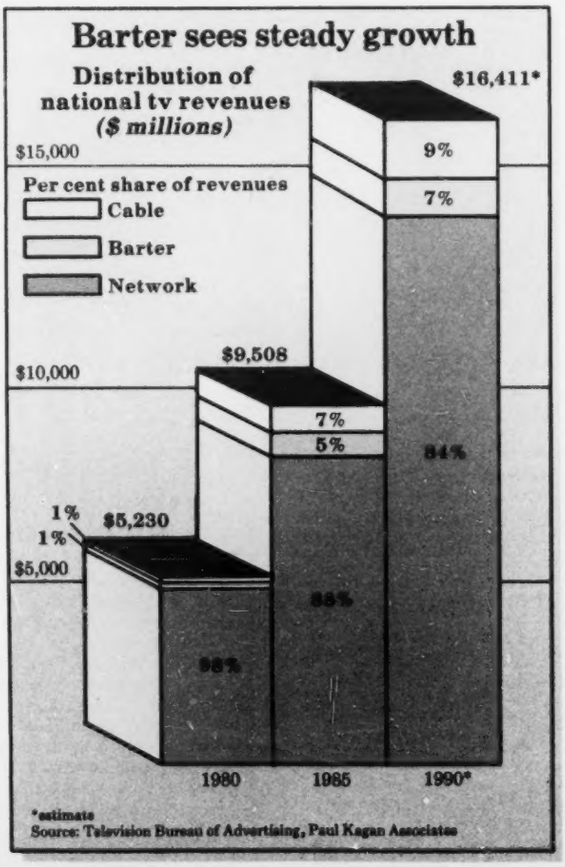
No matter how much crystal ball gazing or hair pulling syndicators may engage in, it will take some time before it's clear whether the pricing squeeze will be brief or lingering. Syndicators with the best chances of remaining intact are those making necessary adjustments to ensure their strength when the marketplace favors them again.

Barter syndication's presence grows

- 1986 estimated yearly advertising revenue: $630 million
  1985 yearly advertising revenue: $530 million
  1984 yearly advertising revenue: $430 million
- In 1985, independent stations carried an average of 28.5 hours of barter syndication weekly.
  In 1984, independent stations carried an average of 22.9 hours of barter syndication weekly.
- In 1985, affiliate stations carried an average of 7.7 hours of barter syndication weekly.
  In 1984, affiliate stations carried an average of 6.8 hours of barter syndication weekly.

Source: INTV/SRA Barter Syndication Survey

Barter sees steady growth



Consumer Magazine Ad Linage

Advertising pages for U.S., Canadian and foreign consumer publications

September

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
— Art & antiques —				
American Artist	—	—	—	—
Antiques	—	—	—	—
Art in America	—	—	—	—
Southwest Art	65.7	79.5	623.8	695.2
Total Group	**65.7**	**79.5**	**623.8**	**695.2**
% change		**– 17.4%**		**– 10.3%**
— Auto/cycle/rec. vehicles —				
Autoweek (52X)	132.6	133.9	1,294.1	1,199.7
Car & Driver	74.4	83.0	812.1	879.8
Car Collector & Car Classics	14.5	17.7	139.5	166.1
Car Craft	84.2	78.3	679.1	685.4
Circle Track	61.6	59.1	562.5	487.2
Cycle	27.9	37.2	412.0	481.7
Cycle Guide (11X)	—	26.5	384.1	376.5
Cycle World	19.4	32.7	431.4	525.6
Dirt Rider	26.3	19.6	363.7	285.6
Dune Buggies & Hot VWs	85.8	105.7	787.9	845.5
Family Motor Coaching	129.3	129.0	1,319.8	1,328.2
4 Wheel & Off-Road	93.1	84.9	789.3	685.0
Four Wheeler	77.1	87.8	753.2	779.0
Hot Rod	56.9	52.0	561.1	551.3
Motorcyclist	24.3	27.6	439.1	359.8
Motor Trend	50.0	57.3	570.6	661.4
Motorhome Life	83.0	72.5	843.9	863.3
Rider	28.1	37.4	461.6	508.3
Road & Track	81.4	92.0	874.3	993.8
3 Wheeling	53.8	64.7	515.6	519.3
Trailer Life	93.1	101.8	1,025.3	1,120.5
Total Group	**1,290.8**	**1,400.7**	**14,020.2**	**14,303.0**
% change		**– 7.8%**		**– 2.0%**
— Boating & yachting —				
Boating	143.5	138.2	1,247.9	1,243.1
Chesapeake Bay	41.0	37.3	339.2	285.5
Cruising World	115.8	125.1	1,086.5	1,130.6
Lakeland Boating (10X)	71.1	61.5	629.1	591.0
Motor Boating & Sailing	159.3	173.6	1,563.6	1,515.8
Sail	113.0	141.8	1,017.9	1,192.4
Small Boat Journal(6X)	—	—	—	—
Trailer Boats(11X)	36.0	29.9	395.0	316.4
Western Boatman(6X)	32.5	43.9	195.3	233.8
Yachting	121.2	160.8	1,248.2	1,478.1
Total Group	**833.4**	**912.1**	**7,722.7**	**7,986.7**
% change		**– 8.6%**		**– 3.3%**
— Canadian —				
L'Actualite	88.0	65.3	698.8	529.6
Chatelaine				
English Edition A.	108.8	110.9	813.0	783.6
French Edition	94.1	85.1	694.1	628.0
City & Country Home(8X)	64.0	60.5	333.9	261.0
City Woman	—	—	—	—
Equinox (6X)	41.3	30.0	188.5	137.0
Flare A.	179.0	110.3	706.6	587.3
Macleans (52X) A.	135.9	149.2	1,069.6	1,003.5
Moneywise	35.2	33.1	302.6	276.2
Montreal Calendar	30.0	43.3	196.1	268.7
Montreal Ce Mois Ci	33.0	54.7	228.0	317.5
Reader's Digest				
Canadian-English A.	83.0	90.2	671.7	607.6
Canadian-French A.	69.0	69.0	555.9	471.7
Toronto Life	—	—	—	—
Vancouver	—	—	—	—
Total Group	**961.3**	**901.6**	**6,458.8**	**5,871.7**
% change		**– 6.6%**		**– 10.0%**
— Civic/fraternal —				
American Legion	20.6	25.6	211.4	232.3
Elks (10X)	19.3	18.7	147.1	152.9
Kiwanis	17.5	16.8	143.7	133.3
Lion (10X)	7.0	8.3	46.3	46.0
Rotarian	18.0	11.8	131.5	99.0
V.F.W. (11X)	25.7	28.5	216.1	218.4
Total Group	**108.1**	**109.7**	**896.1**	**881.9**
% change		**– 1.5%**		**– 1.6%**
— Comics —				
DC Comics	8.0	7.0	47.0	53.5
Marvel Comics Group	9.0	9.0	66.0	61.5
Total Group	**17.0**	**16.0**	**113.0**	**115.0**
% change		**– 6.3%**		**– 1.7%**
— General —				
American Health (10X)	74.2	53.6	430.6	361.7
American West (6X)	30.8	43.5	197.2	175.3
The Atlantic A.	37.2	48.2	311.3	407.0
Audubon Magazine (6X)	32.1	31.5	138.0	168.0
Bon Appetit A.	69.7	84.2	683.8	732.3
Changing Times	57.3	40.5	429.1	341.6
Connoisseur	74.4	80.9	554.3	506.4
Consumers Digest (8x)	26.3	25.8	134.8	145.5
Ebony	87.2	87.6	833.3	825.5
Fifty Plus	—	—	—	—
Food & Wine	53.7	49.5	399.7	414.0
Games	16.0	19.9	142.3	150.0
Gourmet	93.8	91.5	760.8	752.9
Harper's A.	22.7	30.3	204.8	230.1
Harrowsmith (6X)	41.9	—	199.3	—
Home Entertainment (8X)	—	—	—	—
Let's Live	46.0	39.0	432.0	369.0
Life	45.6	48.4	462.6	532.8
Modern Maturity (6X)	41.0	42.8	170.4	185.0
Money	105.1	104.4	1,033.7	1,031.3
Mother Earth News (6X)	—	—	—	—
Mother Jones (9X)	—	—	—	—
National Geographic	—	—	—	—
Natural History	43.2	44.9	356.0	365.2
Prevention	66.7	66.5	542.5	537.8
Psychology Today	32.3	23.9	246.7	212.2
Reader's Digest A.	65.4	74.7	815.4	678.1
Saturday Evening Post (9X)	37.9	38.8	227.2	218.8
Signature	65.7	54.6	594.7	467.5
Smithsonian	93.1	92.9	683.2	770.4
Sylvia Porter's Personal Finance (10X)	42.5	41.7	281.6	198.3
Town & Country	200.0	175.9	1,038.7	1,121.0
Travel-Holiday	50.3	34.5	374.6	389.2
Travel & Leisure	92.0	99.6	860.4	917.9
Vanity Fair	62.2	49.7	371.8	289.8
Writer's Digest	26.5	26.9	222.8	219.5
Yankee	—	—	—	—
Total Group	**1,832.7**	**1,746.2**	**14,133.6**	**13,714.1**
% change		**– 5.0%**		**– 3.1%**
— Home —				
Americana (6X)	—	—	—	—
Architectural Digest A.	116.9	137.8	1,016.7	1,082.9
Better Homes & Gardens	92.8	112.8	931.5	966.2
Colonial Homes (6X)	88.2	80.2	321.3	314.4
Columbus Monthly-Homes(4X)	—	—	81.7	26.8
Country Home (6X)	—	—	—	—
Country Journal	—	—	—	—
Country Living	88.3	82.1	635.2	602.7
Dallas/Ft. Worth Home & Garden	59.4	88.0	681.4	695.2
Family Handyman (10X) A.	45.4	80.8	427.8	472.1
Flower & Garden (6X)	—	—	156.4	158.8
Home	57.4	58.6	433.0	436.6
Home Mechanics	53.1	59.0	527.3	572.2
The Homeowner (10X)	33.4	33.3	221.2	203.8
Horticulture	32.7	29.5	337.5	309.0
House Beautiful	67.9	100.7	626.2	731.4
House & Garden	104.9	105.1	793.0	817.3
Houston Home & Garden	56.1	114.5	668.3	811.7
Metropolitan Home	63.8	81.8	503.8	558.9
1,001 Home Ideas	69.9	74.2	399.3	436.0
Phoenix Home/Garden	65.7	63.0	591.0	570.7
Practical Homeowner	57.3	66.3	375.0	393.2
Rodale's Organic Gardening	43.8	55.3	524.3	506.4
Rx Being Well	24.0	19.0	107.0	93.0
San Diego Home/Garden	—	—	—	—
South Florida Home/Garden	40.8	37.8	—	—
Southern Accents (6X)	113.1	100.1	490.8	435.2
Southern Living	133.6	131.6	1,216.6	1,142.7
Sunset Magazine A.	118.2	119.2	1,201.4	1,236.9
Texas Homes	48.0	73.1	544.9	709.6
Workbench (6X)	45.3	54.8	236.6	264.7
The Workbasket	34.8	44.2	270.8	305.2
Total Group	**1,754.8**	**2,002.8**	**14,316.0**	**14,853.6**
% change		**– 12.4%**		**– 3.6%**
— In-flight & other passenger —				
Aboard Group (7X6X)	—	—	—	—
Alaska Airlines	64.2	47.1	526.5	435.2
American Way (24X)	109.1	113.5	819.5	906.5
East/West Network Eastern Review	93.5	99.0	890.6	851.6
Frontier	34.0	—	306.0	—
Northwest Orient	45.8	41.5	404.7	364.0
Ozark	45.0	50.7	400.6	367.7
PSA Magazine	99.3	98.0	796.1	722.3
Pan Am Clipper	44.3	55.7	401.5	547.0
Republic Scene	50.5	57.2	439.7	411.2
Spirit	105.0	120.8	868.3	824.5
United	99.1	103.0	847.6	807.7
Western's World	59.5	57.2	524.4	474.7
Halsey Publications				
Air Cal	55.0	61.2	474.7	445.3
Delta Sky	80.5	85.5	664.3	645.4
People's Expressions	25.8	—	271.5	—
US Air	55.5	51.1	400.0	416.5
Hawaii (6X)	27.2	21.5	250.0	212.4
Pace	102.5	86.8	748.1	628.2
Presidential Airways (6X)	8.7	—	37.8	—
Spirit of Aloha (6X)	24.4	20.4	251.1	211.4
TWA Ambassador	60.5	71.5	465.4	494.0
Total Group	**1,289.4**	**1,241.7**	**10,788.4**	**9,765.6**
% change		**+ 3.8%**		**+ 10.5%**
— Men's —				
Esquire A.	140.7	152.2	846.2	906.2
Firehouse Magazine (13X)	52.8	105.7	367.7	439.0
Gentlemen's Quarterly A.	—	—	—	—
M Magazine	129.3	96.3	524.4	471.5
Penthouse A.	49.5	49.4	329.6	357.0
Playboy A.	44.8	68.1	536.5	631.8
Salute	24.0	—	91.0	—
Total Group	**441.1**	**471.7**	**2,695.4**	**2,805.5**
% change		**– 6.5%**		**– 3.9%**
— Metropolitan —				
Aloha (6X)	33.1	29.1	147.1	154.3
Atlanta	—	—	—	—
Baltimore	85.3	88.3	667.1	715.9
Boston	165.6	171.6	1,345.5	1,350.3
California	53.0	61.2	597.1	596.9
Chicago	188.1	146.4	1,140.7	1,147.2
Chicago's North Shore	94.7	94.6	722.4	685.8
Cincinnati	61.1	60.2	519.5	479.2
Cleveland	63.5	79.2	617.1	688.9
Coast (39X)	341.2	341.4	2,175.5	2,209.2
Columbus Monthly	86.0	94.7	614.3	623.7
Connecticut	86.2	81.2	833.4	785.3
D/Magazine, Dallas/Ft. Worth	114.5	151.6	1,068.0	1,151.0
Denver	32.0	39.5	315.6	284.1
Detroit Monthly	82.1	80.0	660.2	547.5
Grand Rapids	58.0	84.7	388.6	477.5
Gulfshore Life (10X)	—	—	—	—
Honolulu	56.9	51.2	538.2	532.4
Houston City	45.8	66.7	447.9	616.4
Louisiana Life (6X)	42.3	56.0	192.0	275.0
Madison	78.0	60.0	573.0	552.6
Metropolitan Detroit	72.2	90.0	649.0	641.5
Miami Mensual	43.2	38.4	396.8	337.3
Miami/South Florida	43.3	65.8	593.3	777.1
Mid Atlantic Country	45.7	43.5	356.4	404.9
Milwaukee	64.0	61.7	583.4	563.1
Minneapolis/St. Paul	107.0	122.5	852.9	858.9
Nashville	27.0	40.0	335.0	327.0
New England Monthly	47.2	43.8	332.7	269.3
New Jersey Monthly	87.4	68.2	705.2	534.7
New Mexico	24.4	31.5	241.6	330.4
Ohio	114.2	120.0	572.7	614.0
Oregon	28.7	52.4	275.1	302.3
Orlando	94.5	85.0	888.3	893.5
Palm Beach Life	27.0	29.2	497.6	604.9
Palm Springs Life	264.1	252.0	1,025.1	1,025.2
Philadelphia	161.5	171.7	1,153.5	1,189.8
Phoenix	69.7	76.5	821.2	885.2
Pittsburgh	73.6	75.6	576.8	559.2
St. Louis	63.5	75.6	437.4	559.0
San Diego	122.3	150.5	1,206.4	1,390.8
San Francisco (6X)	—	—	—	—
San Francisco Focus	93.2	96.5	797.9	788.0
Texas Monthly	103.6	158.5	1,058.6	1,070.5
Twin Cities	80.5	88.0	480.0	533.7
The Virginian	57.5	49.5	310.0	277.0
Washington (7X)	62.0	50.5	373.0	194.5
Washington Dossier (11X)	51.0	84.6	388.5	466.3
The Washingtonian	169.7	191.4	1,304.7	1,349.2
Total Group	**3,965.4**	**4,250.6**	**30,776.4**	**31,590.4**
% change		**– 6.7%**		**– 2.6%**
— Movie/romance/radio/tv —				
Macfadden's Women's Group				
Modern Romances	20.6	20.0	190.3	170.7
Secrets	20.6	20.0	190.3	170.7
True Confessions	20.6	20.0	190.3	170.7
True Experience	20.6	20.0	190.3	170.7
True Love	20.6	20.0	190.3	170.7
True Romance	20.6	20.0	190.3	170.7
Sterling Women's Group				
Daytime TV	25.8	27.5	229.7	256.5
Modern Screen	—	—	63.7	58.3
Movie Mirror (6X)	—	—	18.5	71.5
Soap Opera Stars	—	—	62.8	77.1
TV Movie Screen (6X)	—	—	34.5	27.3
TV Picture Life (6X)	—	—	14.2	24.0
TV Game Show	24.0	—	45.0	—
Total Group	**173.3**	**147.7**	**1,610.4**	**1,539.0**
% change		**+ 17.3%**		**+ 4.6%**
— Music/entertainment —				
Audio	78.6	67.2	657.2	681.2
Circus Magazine	—	—	—	—
Dance Magazine	45.3	50.8	467.7	490.8
Musician	59.5	56.0	505.0	520.0
Playbill	47.0	50.7	383.3	428.8
Stereo Review	66.6	116.8	621.9	421.4
Video Magazine	81.9	67.7	671.9	659.7
Total Group	**378.9**	**409.2**	**3,307.0**	**3,201.9**
% change		**– 7.4%**		**+ 3.3%**
— Outdoor & sport —				
Alaska	28.7	41.2	383.9	397.0
The American Handgunner(6X)	51.0	37.0	193.0	173.0
American Hunter	—	—	—	—
American Rifleman	—	—	—	—
Backpacker (6X)	21.1	27.9	140.5	164.5
Bass Master (9X) A.	29.3	28.0	411.4	421.5
Bicycling (9X)	56.0	73.6	639.3	756.6
Duck's Unlimited (6X)	—	—	—	—
Field & Stream	139.1	75.4	814.0	800.6
Fins & Feathers A.	28.1	28.4	302.2	273.9
Fishing World	15.2	9.7	193.3	185.9
Florida Sportsman	67.8	65.1	984.3	901.9
Flying	51.8	48.8	354.0	419.3
Golf Digest	64.5	79.1	886.5	842.3
Golf Magazine	27.5	34.6	635.8	599.9
Gun Dog (6X)	56.3	41.6	174.3	145.1
Guns	29.0	30.0	277.0	208.0
Guns & Ammo	68.4	63.3	445.0	395.0
In-Fisherman (6X)	31.7	40.0	365.0	406.0
Muscle & Fitness	113.6	101.0	984.5	957.3
Outdoor Life	97.3	73.7	692.3	637.9
Outside Magazine	41.4	37.2	424.3	374.3

(X) Represents the number of times published each year; publications are monthly unless otherwise specified.

A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. * All affiliated with Sunday Mag/Net. except Los Angeles Times Magazine and New York Times Magazine.

All figures represented in this chart are supplied by the magazines. Advertising Age makes no attempt to verify them and, therefore, is not responsible for inconsistencies or errors.

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September

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985
Petersen's Hunting	94.7	78.4	439.2	376.3
Runner	29.5	32.2	269.3	308.8
Runner's World (13X)	24.5	36.2	271.8	340.5
Salt Water Sportsman	54.2	61.1	798.3	751.6
Sierra	34.5	48.3	177.9	184.6
Shooting Times	43.3	43.3	329.1	308.3
Ski (8X) A.	156.0	142.0	405.2	357.4
Skiing (7X)	204.0	202.0	374.6	965.0
Skin Diver	86.2	75.0	839.6	734.1
Southern Outdoors (8X)	35.9	38.9	295.2	248.3
Sports Afield	81.3	86.4	642.8	756.3
Tennis	101.5	158.2	679.7	819.7
Western Outdoors (10X)	34.0	30.7	376.1	357.6
Wildfowl (6X)	—	—	71.0	14.8
Wing & Shot	10.0	—	10.0	—
Total Group	**2,007.4**	**1,968.3**	**15,280.4**	**15,583.3**
% change		**+2.0%**		**−1.9%**

— Photography —

American Photographer	41.5	37.3	344.6	354.8
Petersen's Photographic	24.6	35.1	220.9	253.7
Popular Photography	62.0	76.2	581.6	779.2
Total Group	**128.1**	**148.6**	**1,147.1**	**1,387.7**
% change		**−13.8%**		**−17.3%**

— Religious —

Charisma	42.5	52.5	449.5	509.9
Christian Herald (11X)	27.3	42.5	221.7	254.4
Christian Life	24.5	—	192.7	201.3
Christianity Today (18X)	56.2	69.2	378.7	505.7
Inside (4X)	115.3	114.6	297.5	264.3
Ministries Today (6X)	33.0	51.3	262.2	229.2
Moody Monthly (11X)	46.1	56.0	334.7	406.0
Today's Christian Woman(6X)	34.8	53.8	145.3	215.2
Total Group	**379.7**	**439.9**	**2,282.3**	**2,586.0**
% change		**−13.7%**		**−11.7%**

— Science/electronic/mechanic —

Discover	42.4	38.8	281.7	286.6
Family Computing	45.1	48.0	374.8	338.3
Info World (52X)	102.0	94.0	1,100.0	1,111.0
Omni	54.5	51.3	484.2	504.7
Personal Computing	102.9	139.3	888.7	1,163.7
Popular Mechanics	71.7	99.3	826.7	851.1
Popular Science	63.0	64.8	605.8	562.2
Science 86 (10X)	—	—	—	—
Scientific American	26.9	52.8	279.3	375.8
Spectrum	97.7	137.2	746.6	945.4
Total Group	**606.1**	**725.4**	**5,587.8**	**6,138.8**
% change		**−16.5%**		**−9.0%**

— Woman/fashion/service —

Bride's Magazine (6X) A.	—	—	1,544.1	1,343.9
Cosmopolitan A.	255.6	237.4	1,782.9	1,728.7
Essence	88.3	100.2	722.4	714.2
Family Circle (17X) A.	127.1	198.4	1,237.2	1,328.9
Family Magazine	53.3	36.8	380.8	348.1
Glamour	271.5	266.1	1,598.9	1,591.9
Good Housekeeping A.	168.0	172.6	1,401.3	1,427.0
Harper's Bazaar	335.6	322.6	1,250.4	1,307.7
Health	41.8	39.4	360.3	355.1
Mademoiselle	226.4	190.9	1,171.5	1,132.9
McCall's	107.2	112.6	804.8	805.0
Military Lifestyle	66.0	30.9	441.3	257.3
Modern Bride (6X)	422.0	408.5	1,367.1	1,320.0
Ms	37.8	52.0	342.6	418.9
New Woman	92.9	71.2	647.2	472.5
Parents Magazine A.	93.1	102.3	812.7	763.7
Playgirl	29.4	34.7	282.2	272.1
Redbook	101.6	112.8	805.6	803.4
Self	109.5	124.5	814.3	849.8
Seventeen	128.0	117.6	1,061.2	1,141.0
Shape	94.8	79.5	655.6	565.6
Soap Opera Digest (26X)	16.8	25.0	174.6	250.6
'Teen Magazine	69.7	65.3	477.9	467.8
True Story A.	48.7	51.6	415.5	425.8
Vogue	544.7	550.8	2,289.7	2,339.4
W Magazine	203.0	167.0	1,018.3	969.0
Weight Watchers	42.0	32.2	300.8	251.7
Working Woman	117.7	127.7	889.1	876.1
Total Group	**3,893.0**	**3,830.5**	**25,050.3**	**24,528.2**
% change		**+1.6%**		**+2.1%**

— Youth —

Boys' Life	32.6	36.2	150.1	174.2
Total Group	**32.6**	**36.2**	**150.1**	**174.2**
% change		**−10.0%**		**−13.9%**

August

	Current month 1986	Current month 1985	Year-to-date 1986	Year-to-date 1985

— Business —

Advantage	59.0	49.0	471.0	382.0
Arizona Bus. Gazette(52X)	27.5	23.2	248.7	212.1
Austin Business Journal (52X)	42.9	68.3	351.4	460.5
Baltimore Business Journal	56.0	52.4	525.8	498.9
Barron's (52X)	133.5	141.1	1,426.3	1,452.8
Boston Business Journal (52X)	101.5	128.1	1,041.8	1,074.1
Business Atlanta	62.7	63.1	517.9	528.2
Business First of Buffalo	53.4	64.9	470.4	510.0
Business First of Columbus	83.1	40.4	645.1	503.4
Business Journal-Milwaukee	104.9	109.2	783.0	869.0
Business Journal/Sacramento	48.8	35.6	331.4	301.9
Business North Carolina	61.0	39.0	339.5	269.8
Business Week (52X) A.	189.9	191.7	2,284.4	2,658.6
Business West	—	—	104.0	79.0
Cincinnati Business Courier	46.3	57.0	565.5	467.7
Corporate Report/Kansas City	—	35.8	211.4	372.0
Corporate Report/Minnesota	73.6	75.2	620.1	729.9
Crain's Cleveland Business(52X)	65.0	62.1	474.0	589.0
Crain's New York Business	22.2	18.9	261.1	113.6
Dun's Business Month	30.4	39.6	353.1	357.2
Financial World (26X)	39.8	48.1	444.5	358.1
Florida Trend (13X)	57.9	52.5	629.2	708.3
Forbes (26X)	159.7	149.9	1,955.7	2,095.9
Fortune (26X)	194.4	214.6	1,627.6	2,019.6
Frequent Flyer	58.0	51.0	466.6	468.4
Futures (13X)	82.1	76.0	403.3	413.0
Georgia Trend	42.0	—	412.6	—
Grand Rapids Bus. Journal	—	—	—	—
Hawaii Business	—	—	—	—
High Technology	21.7	30.0	153.1	252.7
Houston Bus. Journal (52X)	70.2	104.4	648.1	923.4
Inc. Magazine A.	49.5	47.4	661.6	709.8
Income Opportunities	75.9	53.6	396.1	319.3
Industry Week (25X) A.	79.3	59.1	686.5	657.4
Indianapolis Bus. Journal (52X)	158.8	116.4	1,169.5	945.7
Kansas City Business Journal	140.3	156.4	979.7	1,137.4
Manhattan Inc.	50.3	38.2	509.6	287.4
Nation's Business A.	26.5	17.8	275.5	259.4
New England Bus.(20X) A.	73.0	72.3	620.4	689.0
Pacific Business News (52X)	116.6	100.3	935.5	866.8
Philadelphia Bus. Journal (52X)	89.4	73.1	872.2	685.7
Pittsburgh Business Times (52X)	101.8	69.6	734.1	595.0
Regardie's	141.8	153.3	1,121.7	982.8
San Jose Business Journal	66.2	113.6	715.3	858.2
Savvy	25.8	16.4	239.7	242.1
South Florida Bus. Journal	76.3	71.1	821.6	662.8
St. Louis Business Journal (52X)	119.2	135.1	1,084.9	1,111.8
Texas Business	62.6	73.1	471.9	562.9
Venture	56.3	64.8	548.3	567.8
Total Group	**3,497.0**	**3,452.5**	**31,610.4**	**31,810.3**
% change		**+1.3%**		**−0.6%**

— National Sunday magazines —

Parade (52X)	52.7	69.3	466.8	470.0
USA Weekend (52X)	37.3	42.2	399.8	394.0
Total Group	**90.0**	**111.5**	**866.6**	**864.0**
% change		**−19.3%**		**+0.3%**

— Newspaper Sunday magazines —

Boston Globe	249.6	214.9	1,602.7	1,459.4
Chicago Tribune	69.9	110.5	665.8	827.2
Cleveland Plain Dealer	65.5	43.0	378.9	337.7
Columbus Dispatch	29.8	47.4	298.1	352.4
Detroit News	90.0	88.0	695.0	680.0
L.A. Times	48.8	40.0	546.4	481.6
Louisville Courier-Journal	62.7	72.4	486.4	531.7
Miami Herald	49.9	35.1	379.6	309.2
New York Times Magazine	322.5	336.5	2,317.9	2,564.0
Philadelphia Inquirer	71.3	60.0	510.0	386.4
San Francisco Image	51.2	83.9	613.3	459.5
Seattle Times	84.0	60.0	425.0	343.0
Toledo Blade Magazine	35.4	42.3	302.7	317.5
Washington Post	104.1	99.6	899.5	859.2
Total Group	**1,334.7**	**1,333.6**	**10,121.3**	**9,908.8**
% change		**+0.1%**		**+2.1%**

— Weeklies/bi-weeklies —

The Advocate (26X)	105.7	83.2	1,072.0	709.8
Army Times Military Group:				
Air Force Times (52X)	149.7	136.9	1,397.7	1,219.8
Army Times (52X)	140.0	134.2	1,294.4	1,191.4
Navy Times (52X)	154.6	148.2	1,423.7	1,300.3
The Blood-Horse (52X)	371.5	407.3	2,899.7	3,427.7
Capper's Weekly (17X)	24.9	23.7	207.2	191.8
Commonweal (22X)	3.0	1.9	51.6	44.2
Grit (52X) A.	22.8	18.5	188.2	151.9
National Journal (50X)	31.3	14.0	423.7	366.0
National Review (25X)	30.0	17.7	237.0	177.8
New Republic (48X)	22.2	20.6	262.6	218.0
New Yorker	110.1	117.3	1,419.8	1,675.7
Newsweek (52X) A.	105.8	140.4	1,439.8	1,589.0
People (52X)	208.3	241.6	2,233.5	2,242.5
Rolling Stone (25X)	85.6	74.4	821.5	666.1
Sporting News (52X)	59.3	40.1	407.1	307.6
Sports Illustrated (52X) A.	131.9	163.0	1,645.8	1,685.0
Time (52X) A.	120.6	127.9	1,501.9	1,585.2
Travelhost (52X) C.	3,625.0	3,618.5	25,537.0	25,304.0
TV Guide (52X) A.	171.6	203.8	2,154.3	2,230.7
TV Update (52X) C.	2,670.0	2,685.0	19,139.0	18,615.0
Us Magazine (26X)	36.3	39.5	334.1	233.6
U.S. News & World Report (52X) A.	79.3	93.5	949.2	1,035.9
Total Group	**8,469.4**	**8,551.3**	**67,040.8**	**66,169.1**
% change		**−1.0%**		**+1.3%**

— Foreign —

Business Week Int'l (52X)	61.0	64.5	949.2	904.5
Cosmopolitan en Espanol:				
Central America	5.0	2.3	29.3	9.0
Colombia	15.2	15.5	99.5	96.0
Ecuador	—	—	—	2.0
Mexico	37.3	39.5	300.7	343.5
Peru	—	—	—	21.0
Puerto Rico	10.5	13.0	79.5	164.8
U.S.(Spanish language)	18.8	19.2	192.5	131.7
Venezuela	18.0	17.8	102.3	181.5
Cosmopolitan Foreign Editions:				
Australia	72.0	73.4	479.4	470.7
Brazil	61.1	64.2	342.5	345.5
China	59.4	30.8	199.8	171.2
France	40.3	29.0	542.0	750.5
Germany	68.7	47.2	799.0	714.7
Great Britain	98.0	95.0	861.8	858.1
Greece	23.0	21.0	457.4	455.4
Holland	33.0	24.0	481.3	472.3
Italy	19.3	18.0	—	377.4
Japan	35.3	28.7	253.5	247.0
South Africa	87.0	95.0	640.0	648.0
Good Housekeeping Foreign Editions:				
Australia	47.3	37.4	258.9	265.2
Great Britain	96.3	98.4	939.8	943.7
Japan	84.5	74.3	577.4	292.5
Buenhogar:				
Central America	1.0	—	9.0	7.0
Chile	—	—	10.0	8.0
Colombia	37.3	28.5	237.2	247.5
Ecuador	13.0	24.0	86.0	127.0
Mexico	32.3	51.3	232.0	347.2
Peru	8.5	19.5	50.0	78.5
Puerto Rico	10.5	9.5	73.5	82.8
U.S.	13.0	18.3	155.3	134.8
Venezuela	23.3	37.2	165.0	289.7
De Armas Publications:				
Geomundo:				
Central America	3.0	6.0	29.0	36.5
Chile	4.0	5.0	33.0	38.5
Colombia	6.0	10.5	60.8	66.5
Ecuador	4.0	4.0	24.0	30.0
Mexico	5.0	8.0	64.2	55.5
Peru	3.0	4.0	21.0	36.5
Puerto Rico	1.0	—	22.5	22.0
U.S.	4.0	4.0	38.0	50.3
Venezuela	6.0	5.0	99.5	68.0
Hombre De Mundo:				
Central America	1.0	3.0	39.0	27.0
Chile	2.0	4.0	41.0	34.0
Colombia	10.0	7.3	105.2	50.8
Ecuador	1.0	2.0	36.0	28.5
Mexico	10.5	10.5	112.5	82.0
Peru	1.0	2.0	24.0	23.0
Puerto Rico	1.0	2.0	34.0	43.0
U.S.	5.0	7.0	79.0	67.0
Venezuela	14.5	11.0	145.5	130.0
Ideas Para Su Hogar:				
Central America	—	—	—	—
Chile	—	—	—	—
Colombia	9.2	17.7	77.0	107.7
Ecuador	2.0	5.0	16.0	37.0
Mexico	6.7	15.2	49.7	79.2
Peru	1.0	2.0	22.5	17.0
Puerto Rico	0.2	—	0.2	10.5
U.S.	2.0	6.5	25.0	47.0
Venezuela	9.0	18.8	72.7	127.8
Mecanica Popular:				
Argentina	9.2	1.0	32.0	16.3
Central America	7.3	9.2	68.2	74.7
Chile	3.0	3.3	35.0	25.8
Colombia	14.3	15.5	117.0	105.0
Mexico	16.5	17.2	84.2	114.5
Peru	13.8	11.5	78.7	89.0
Puerto Rico	6.8	8.5	52.2	74.3
U.S.	5.0	7.0	48.0	56.7
Venezuela	10.5	10.8	85.5	103.7
Vanidades Continental:				
Central America	9.7	5.2	112.0	45.7
Chile	1.7	2.3	28.2	19.7
Colombia	91.3	71.0	531.5	480.5
Ecuador	13.7	20.0	136.2	148.0
Mexico	75.0	87.8	563.5	608.5
Peru	8.3	26.5	90.2	101.8
Puerto Rico	23.2	20.3	251.0	246.7
U.S.	39.0	34.0	328.3	286.7
Venezuela	32.5	36.3	267.0	365.0
International Communications:				
African Business	20.8	24.0	213.3	197.4
The Middle East	5.6	12.8	88.5	127.6
New African	16.8	17.8	141.9	125.9
Johnston International:				
Alam Attijarat	25.5	41.8	258.7	352.4
Modern Africa (6X)	25.1	11.8	78.3	48.6
Modern Asia (11X)	46.8	40.0	288.0	229.2
Latin America Finance (6X)	20.4	16.4	94.5	50.4
Newsweek International A.				
Atlantic (52X)	35.3	45.3	573.1	594.3
Latin America (52X)	17.5	24.8	224.6	197.7
Pacific (52X)	32.3	46.9	416.8	446.8
Progreso (9X)	8.3	16.0	50.5	71.1
Reader's Digest:				
Arabic	8.0	8.0	44.5	82.5
Asian	209.5	204.0	1,701.3	1,548.0
Australian	41.3	47.3	437.0	427.7
Belgian-Flemish	27.0	27.5	488.4	582.4
Belgian-French	21.0	21.0	289.1	391.5
British	33.7	26.1	349.1	333.0
Chinese B.	82.5	127.0	777.3	974.0
Danish	12.0	19.8	215.7	232.8
Dutch	27.5	19.8	270.6	266.2
Finnish	39.0	44.0	310.0	352.9
French	3.5	16.8	111.1	337.2
German	35.7	37.3	459.2	484.5
Iberian	1.0	—	9.0	31.0
Indian-English	49.5	53.0	624.5	732.5
Indian-Hindi	9.5	5.0	80.5	86.5
Italian	20.0	9.0	294.5	258.5
Korean	33.0	27.0	226.0	193.2
Latin American:				
Argentina	11.0	33.0	97.5	154.5
Brazil	—	5.0	18.0	37.0
Central American	8.0	8.0	49.0	68.0
Chile	7.0	14.5	76.5	84.5
Colombia	30.0	35.0	175.0	203.5
Ecuador	6.0	10.0	47.0	67.0
Peru	8.0	11.0	55.0	72.5
Puerto Rico	5.0	4.0	36.5	37.0
U.P.B.	6.0	7.0	45.0	53.5
U.S. Spanish	25.5	9.0	138.0	70.0
Venezuela	4.0	9.0	83.5	81.0
New Zealand	53.0	75.0	403.3	432.0
Norwegian	4.5	19.3	58.0	153.3
Portugal	27.0	21.0	275.8	267.1
South African	97.0	79.0	586.5	694.0
Swedish	6.5	18.0	122.5	118.5
Swiss-French	5.0	13.0	155.8	180.0
Swiss-German	10.0	19.0	211.5	251.5
Time International:				
Time-Asia	39.8	64.0	508.4	614.9
Time-Atlantic	32.5	59.3	656.3	686.0
Time-Canada	71.9	82.5	1,241.6	1,146.8
Time-Latin America	22.5	35.6	328.9	307.8
Time-South Pacific	76.1	92.9	668.9	839.4
Visao (52X)	138.8	128.5	1,051.0	923.2
Vision/Latin America (24X) A.	21.6	23.6	193.9	190.4
Total Group	**3,247.5**	**3,510.8**	**30,183.2**	**31,927.9**
% change		**−7.5%**		**−5.5%**